



Advisor Connection

Financial education

Convenient educational seminars provide actionable strategies to help employees address their financial wellness.

Financial stress can affect employee focus, well-being and overall productivity. Advisor Connection delivers comprehensive financial education at no additional cost, equipping employees with the tools and knowledge to achieve their financial goals. Our program goes beyond the basics, offering resources on critical topics and empowering employees to take control of their financial future with confidence.

Resources for employers

- Registration managed by Securian Financial
- Ready-to-use promotional materials
- Participation and satisfaction reports

Resources for employees

- Seminars appropriate for all age groups and levels of financial awareness
- Workbooks with key concepts
- A one-on-one, complimentary, no-obligation conversation with a financial professional, if desired



Questions?

Visit [Financial wellness 360 - Advisor connection](#) or contact advisorconnection@securian.com.

Employer-specific seminars

Employer-specific seminars are designed around your employee needs, providing targeted education in a dedicated session for your workforce.

Personal finance for all employees

Personal finance strategies to help employees identify money challenges, set goals and take action.

Retirement saving for all employees

Practical saving strategies inspire employees to take action on their goals.

Investment fundamentals for all employees

Investment information and considerations that can build the foundation for employees' current and future investments.

Retirement income for employees nearing retirement

Retirement distribution and investment concepts help employees with important considerations as they near retirement.

Social Security and Medicare for employees nearing retirement

Essential facts about Social Security and Medicare to help employees prepare for retirement.

Estate planning basics for all employees

Information to create a foundation for estate planning – including will preparation, naming beneficiaries and other important concepts.

Group seminars

Group seminars bring together employees from multiple employers for education on key financial topics, with guidance to leverage their employer-specific benefits.*

Caregiving for all employees

Practical guidance and resources to help employees navigate caregiving costs and planning – for loved ones or their own future needs.

College education strategies for all employees

Overview of fundamental strategies that can help employees financially prepare for higher education.

*All group session participation is conducted anonymously. Participants will not have access to information identifying other employers or individuals in attendance.

Please note: for compliance with internal policies, any recording and/or use of AI-powered notetaking tools (e.g., Otter.ai, Fireflies.ai, etc.) are not allowed during sessions.

This is a general communication for informational and educational purposes. The materials and the information are not designed, or intended, to be applicable to any person's individual circumstances. It should not be considered investment advice, nor does it constitute a recommendation that anyone engage in (or refrain from) a particular course of action. If you are seeking investment advice or recommendations, please contact your financial professional.

Advisor Connection services are not part of your group contract with Securian Financial and may be discontinued at any time.

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